

# CITY OF SCOTTSDALE VISITOR INQUIRY STUDY

August 2010

Prepared for  
City of Scottsdale

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## INTRODUCTION

This study was commissioned by the City of Scottsdale. The primary purpose of this effort was to determine the travel patterns of individuals who contacted the Scottsdale Convention and Visitors Bureau (SCVB) for Scottsdale tourism information. More specifically, this study focused on the following key areas:

- Travel to Scottsdale since contacting the SCVB
- Characteristics of trips made to Scottsdale (length of stay, accommodations, travel mode, party configuration, trip spending)
- Activities participated in while in Scottsdale
- Evaluation of Scottsdale as a travel destination
- Sources of travel information
- Internet usage patterns
- Inquirer demographics

This study represents the thirteenth annual Visitor Inquiry Study commissioned by the City in this series. The information contained in this report is based on 615 in-depth interviews with individuals who contacted the SCVB via either: 1) the call center, a business reply card (BRC) or a reader service listing (RSL) or 2) the Bureau's website. Those individuals who contacted the SCVB via the call center, BRC or RSL were interviewed via telephone survey (300 interviews), while those who made contact via the website were interviewed via a web-based survey (315 interviews).

The sample for this study was segmented to include approximately 150 individuals who contacted the SCVB over each of four specific time periods – April-June 2009, July-September 2009, October-December 2009, January-March 2010.

The telephone interviewing segment of this research was conducted by professional interviewers of the Behavior Research Center during July 2010 at the Center's central location Computer-Aided Telephone Interviewing facility, while the web-based interviewing segment was conducted in July and early August 2010. Similar to each of the prior surveys, the final study data was weighted to reflect the actual distribution of web and non-web based contacts with the SCVB. The margin of error for this study is approximately +/-4.0 percent at a 95 percent confidence level.

The information generated from this study is presented in three sections. The first section, *Overview*, offers the primary findings of the study in a brief summary format. The second section, *Summary Of Findings*, reviews each study question in detail. The final section, *Appendix*, contains a copy of the survey questionnaire.

The Behavior Research Center has presented all of the data germane to the basic research objectives of this project. However, if the City of Scottsdale requires additional data retrieval or interpretation, we stand ready to provide such input.

**BEHAVIOR RESEARCH CENTER**

## OVERVIEW

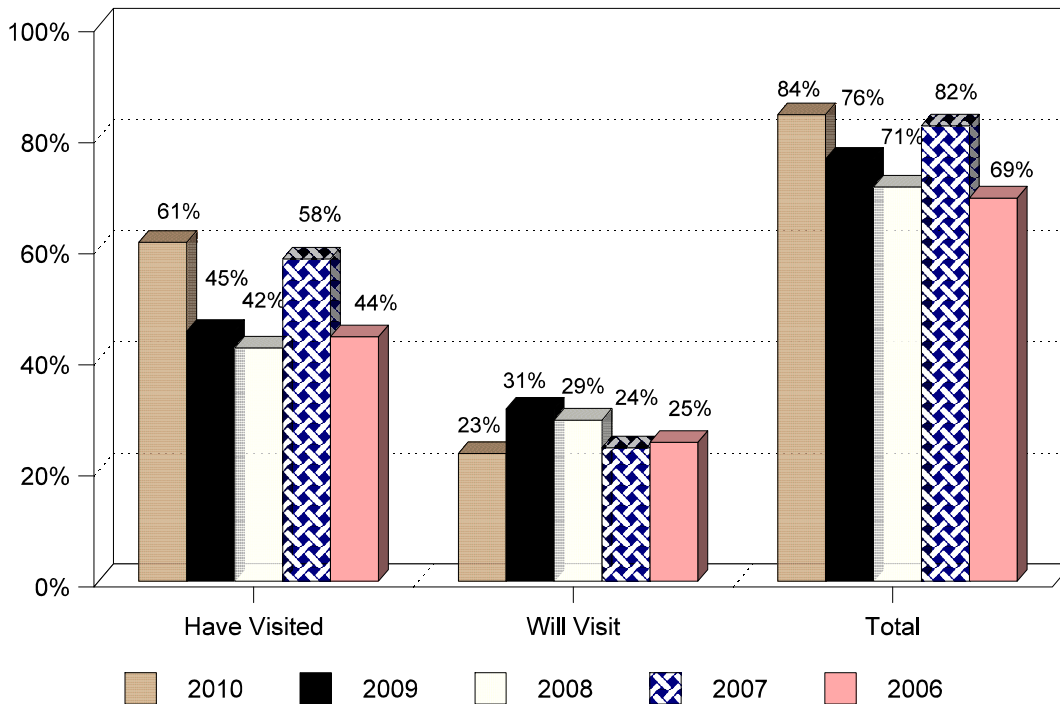
### KEY STUDY FINDINGS

- The overall Scottsdale visitation reading (have visited/will visit) of 84 percent represents an eight-point increase from last year's reading of 76 percent and exceeds the former high point of 82 percent which was recorded in the pre-recession year of 2007.
- The typical Scottsdale visitor is 56 years old (little changed from 57 last year) and very affluent, with a median yearly income of \$103,000 (up from \$101,600 last year).
- The median length of stay by Scottsdale visitors is 5.8 nights – little changed from prior years.
- The typical visitor travel party size has remained virtually unchanged over the past several years at 2.7 persons.
- Fifty-seven percent of visitors stayed in a hotel, motel or resort – unchanged from last year but down from 68 percent in 2007 and 65 percent in 2008.
- Average daily spending of overnight visitors has recovered from \$391 last year to \$430 this year.
- Ninety-three percent of visitors rate Scottsdale as an excellent or good vacation destination, unchanged from the past several years.
- Inquirers indicate they will take +13 net more trips in the coming 12 months (up from +8). At the same time, +9 net indicate they will take longer trips (up from +2) and +2 net indicate they will spend more (up from -9) in the coming 12 months.

### SCOTTSDALE VISITATION PATTERNS (TABLES 1 - 5)

- Sixty-one percent of inquirers have visited Scottsdale since contacting the CVB, while an additional 23 percent indicate they will visit in the next 12 months. This overall visitation reading of 84 percent represents an increase from last year's reading of 76 percent.
- Sixty-seven percent of visitors contacted the CVB before they made their decision to visit Scottsdale, while 33 percent made contact after they decided to visit.
- Fifty-five percent of past visitors (down from 63% in 2009) indicate they will visit Scottsdale again over the next year.
- Ninety-two percent of all inquirers have visited Scottsdale at least once during the past three years – up from 84 percent last year and 66 percent in 2008. Further, 88 percent of inquirers who visited during the study cycle have visited more than one time over the past three years.

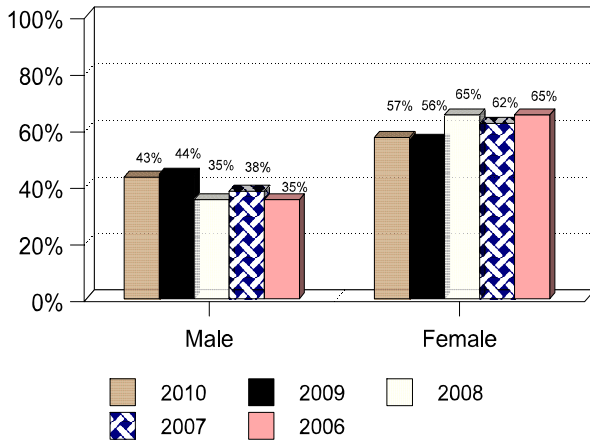
## SCOTTSDALE VISITATION PATTERNS



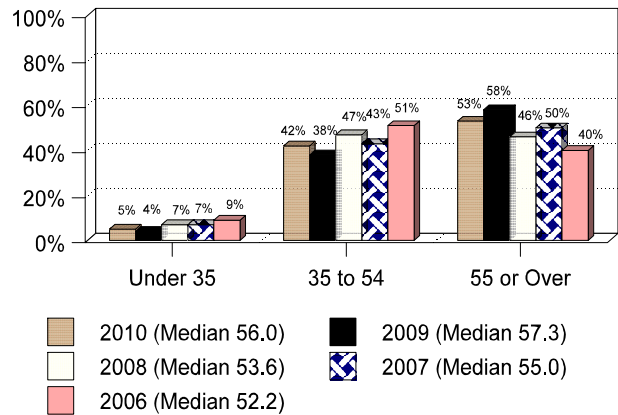
## INQUIRER DEMOGRAPHICS (TABLE 6)

- Females account for 57 percent of inquiries – unchanged from 56 percent last year but down from 65 percent in 2008.
- The typical inquirer continues to be in his/her 50s (56.0 median age), with 63 percent of all inquirers being 45 to 64 years old. The median age of inquirers is down slightly from 57.3 last year, the oldest mean age ever recorded in this series of studies.
- Scottsdale inquirers continue to be a very affluent group, with a median household income of \$97,600 – a figure which is up from \$86,100 in 2009 and \$92,100 in 2008. Individuals who have visited the city reveal the highest median incomes (\$103,000).
- Thirty-five percent of inquiries come from the Midwest, 24 percent from the West, 21 percent from the South and 20 percent from the Northeast. These figures represent little change from last year.

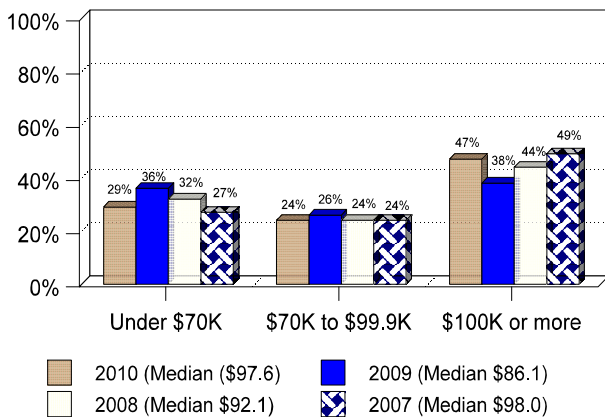
### GENDER



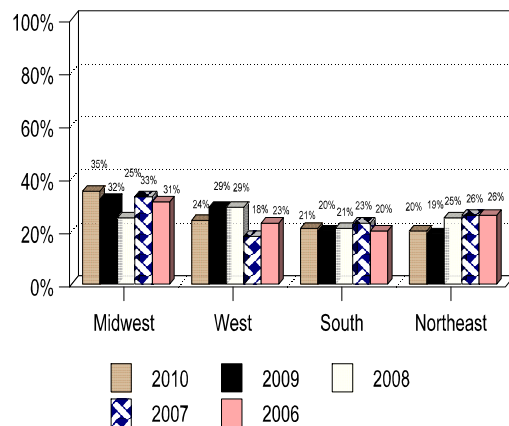
### AGE



### INCOME



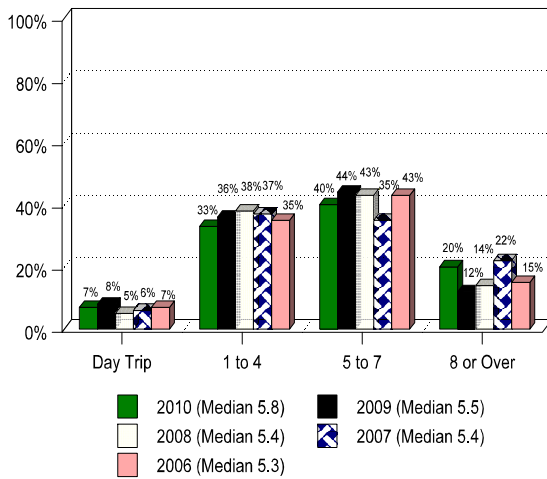
### REGION



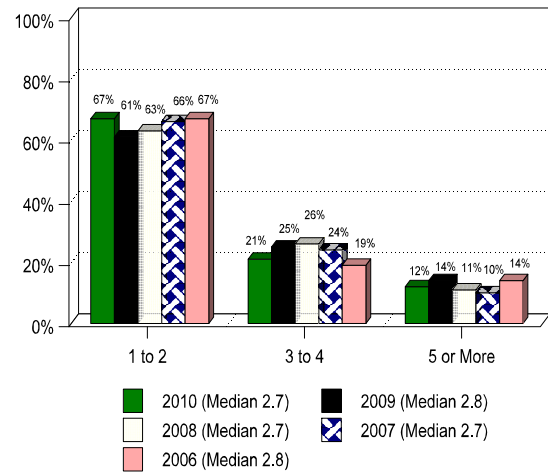
## TRIP CHARACTERISTICS (TABLES 7-11)

- The typical visitor to Scottsdale spent 5.8 nights, with 60 percent staying five nights or more. Day-trippers comprise seven percent of visitors. These readings closely mirror the patterns recorded over the past several years.
- Thirty-two percent of inquirers who visited Scottsdale did so during the January to March 2010 period, while 25 percent visited during the April to June 2010 period.
- The typical travel party size among inquirers who have visited or will visit the city is 2.7 people, with over one-half of all parties (56%) containing two individuals. These patterns reveal a party size which is very similar to the patterns found in each of the previous studies.
- Six out of ten Scottsdale visitors (59%) stayed at either a luxury resort (29%), a full-service hotel (21%) or a limited-service hotel or motel (9%). This overall hotel reading is unchanged from last year but down from 68 percent in 2007 and 65 percent in 2008.
- The typical overnight Scottsdale visitor party spent \$430 per day while in Scottsdale, which is a recovery from last year's figure of \$391.

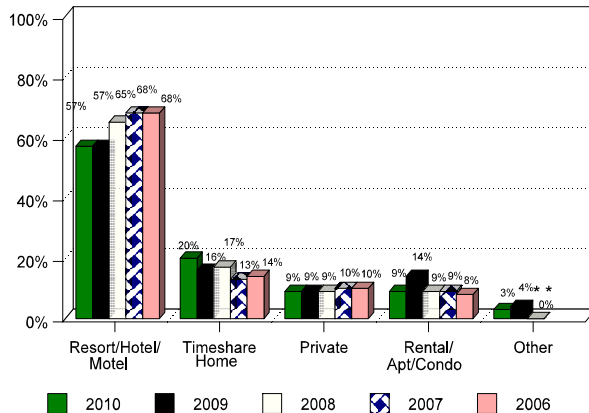
### LENGTH OF VISIT



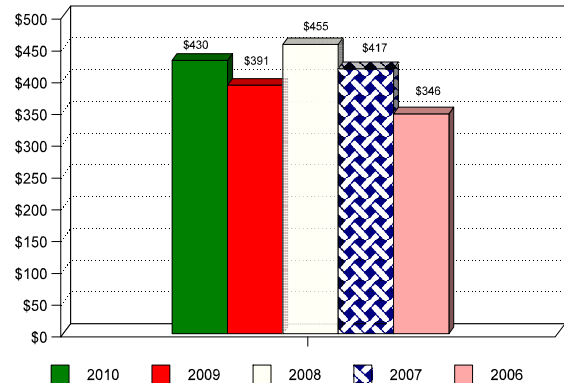
### PARTY SIZE



### ACCOMMODATIONS



### OVERNIGHT VISITOR TRIP SPENDING



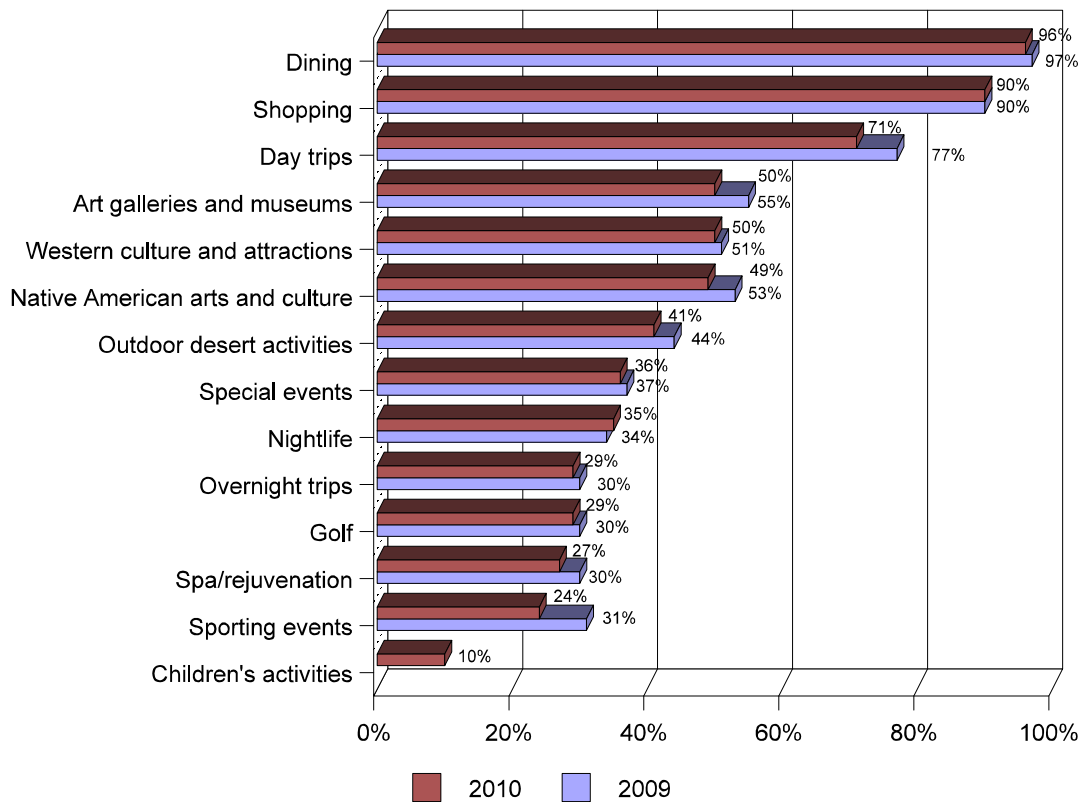
**TRAVEL TO OTHER DESTINATIONS (TABLE 12)**

- Thirty-six percent of all inquirers have visited Florida in the past 12 months, while 18 percent have visited Tucson, 18 percent Mexico and 17 percent San Diego. As in the past, travelers' visitation patterns are tied closely to the region in which they reside.

**ACTIVITIES PARTICIPATED IN (TABLES 13-15)**

- As has been the case in prior years, dining (96%) and shopping (90%) are the most frequently participated-in activities, followed by day trips (71%), art galleries and museums or performing arts (50%) and western culture/attractions (50%). These readings are relatively consistent with last year.

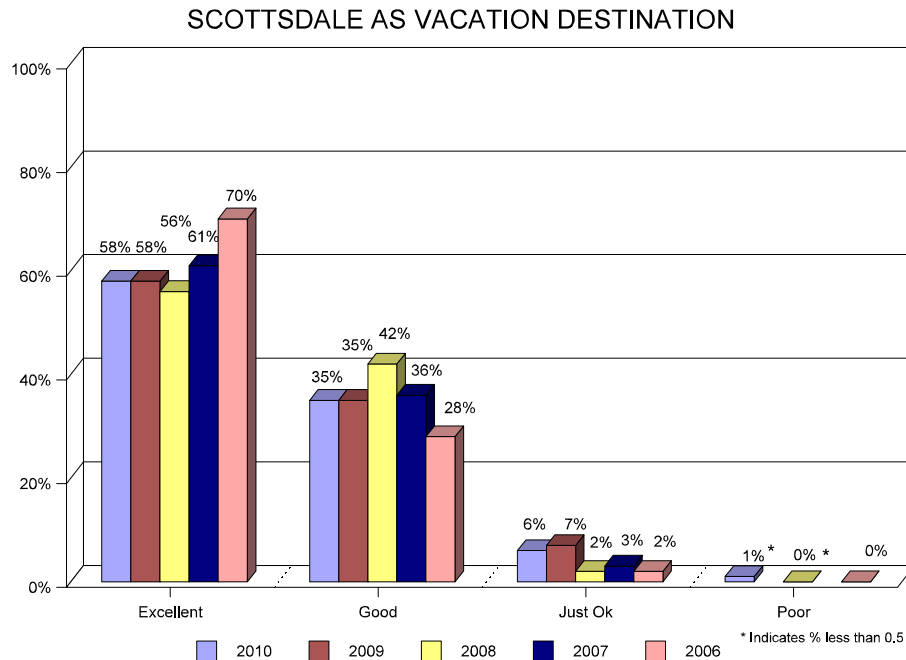
**ACTIVITIES PARTICIPATED IN**



- The most popular locations for day and overnight trips for Scottsdale visitors continue to be Sedona and the Grand Canyon.

## Evaluation Of Scottsdale As A Vacation Destination (Table 16)

- Over nine out of ten inquirers who have visited Scottsdale (93%) continue to rate it as either an excellent (58%) or good (35%) vacation destination compared to other areas they have visited. In comparison, six percent rate the city as just okay and one percent rate it as poor. The excellent rating of 58 percent is unchanged from 58 percent last year. The excellent rating of 58 percent is unchanged from 58 percent last year.



## RECEIPT OF SCOTTSDALE CVB MATERIALS (TABLES 17-20)

- Two out of three Scottsdale visitors (67%) indicate they received printed materials from the Scottsdale CVB. This reading is down from a high of 80 percent in 2005 and 72 percent last year.
- Among the 67 percent of visitors who indicate they received printed materials from the CVB, 94 percent report the materials were received in a timely fashion. This reading is unchanged from prior years.
- The materials the CVB distributes continue to be viewed positively by visitors, with 59 percent indicating they were very useful and 39 percent somewhat useful. Only two percent of visitors indicate the materials were not useful. The very useful reading is down from 64 percent in 2009.
- Better than nine out of ten visitors (92%) are satisfied with the physical size of the guide they received.

## WEBSITE VISITATION (TABLES 21-22)

- Thirty-six percent of inquirers with Internet access have visited the Scottsdale CVB's website in the past six months – down from 42 percent last year and 52 percent in 2007. This is the third consecutive year the percentage of visitors has declined.
- When inquirers with Internet access are asked about their interest in receiving information in selected electronic formats, emails (34% very interested) generate the highest interest followed by PDF documents (24%) and videos (20%). The email reading is down eight points from last year after increasing by seven points between 2008 and 2009.

## CHANGES IN PLEASURE TRAVEL NEXT 12 MONTHS (TABLES 23-25)

- Inquirers were asked how they thought their leisure travel patterns may change in the next 12 months in terms of number of trips, length of trips and spending level. This line of questioning reveals the following:
  - TRIP FREQUENCY: Twenty-six percent of inquirers indicate they will take more trips in the coming 12 months, while 13 percent say they will take fewer trips for a +13 net more reading – up from +8 in 2009.
  - TRIP LENGTH: Twenty-two percent of inquirers indicate they will take longer trips, while 13 percent say they will take shorter trips for a +9 net longer reading – up from +2 in 2009.
  - TRIP SPENDING: Eighteen percent of inquirers indicate they will spend more on trips, while 16 percent say they will spend less for a +2 net spending reading – up from -9 in 2009.

## SUMMARY OF FINDINGS

### SCOTTSDALE VISITATION PATTERNS

Sixty-one percent of inquirers have visited Scottsdale since contacting the CVB, while an additional 23 percent indicate they will visit in the next 12 months. This overall visitation reading of 84 percent represents an increase from last year's reading of 76 percent and exceeds the former high point of 82 percent which was recorded in the pre-recession year of 2007.

The data also reveals several other interesting patterns:

- Inquirers who contacted the CVB via the Bureau's website continue to reveal far higher visitation to Scottsdale than those who contact the CVB via other means – (88% vs. 68%). While the website reading is little changed from 89 percent last year, the other reading is up sharply from 50 percent.
- Actual visitation to Scottsdale increases in direct correlation to increased income. This pattern is consistent with previous findings.
- Inquirers from each of the four regions record increases in actual visitation from last year, with the South region revealing the highest increase of +30.

TABLE 1: SCOTTSDALE VISITATION PATTERNS

“To begin, have you visited Scottsdale since requesting information?”

(IF NO) “Do you plan on visiting Scottsdale during the next 12 months?”

	HAVE VISITED	WILL VISIT	TOTAL
<u>TOTAL</u> - 2010	61%	23%	84%
- 2009	45	31	76
- 2008	42	29	71
- 2007	58	24	82
- 2006	44	25	69

DETAIL: 2010

<u>CONTACT MODE</u>			
Other <sup>1</sup>	45%	23%	68%
Web	65	23	88
 <u>GENDER</u>			
Male	62	23	85
Female	62	22	84
 <u>AGE</u>			
Under 35	65	22	87
35 to 54	63	21	84
55 or over	61	25	86
 <u>INCOME</u>			
Under \$70,000	50	32	82
\$70,000 to \$99,999	62	27	89
\$100,000 or over	66	20	86
 <u>REGION</u>			
West	67	21	88
Midwest	65	26	91
Northeast	63	22	85
South	64	16	80

<sup>1</sup>BRC, Call Center, RSL

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A new question this year asked inquirers who had not visited since inquiring, why they did not plan on visiting Scottsdale in the next 12 months. Here we find the main reasons are that they simply decided to go elsewhere (25%) or do not plan any trips due to personal reasons such as lack of time or family illness. Also note that 12 percent mention SB1070 and two percent safety.

TABLE 2: REASONS FOR NOT PLANNING TO VISIT

(AMONG THOSE WHO HAVE NOT VISITED SINCE MAKING AN INQUIRY AND DO NOT PLAN TO VISIT IN THE NEXT 12 MONTHS)

“Why don’t you plan on visiting Scottsdale in the next 12 months?”

|                                                   |     |
|---------------------------------------------------|-----|
| Decided to go elsewhere                           | 25% |
| Personal reasons – no time, illness               | 16  |
| Haven’t made a decision yet on where to go        | 15  |
| Cannot afford – financial problems                | 12  |
| Because of SB1070                                 | 12  |
| Too expensive                                     | 8   |
| Been there in the past, want to try something new | 6   |
| Too far away                                      | 2   |
| Not family oriented                               | 2   |
| Not safe                                          | 2   |
| Not sure                                          | 3   |

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Inquirers who had visited Scottsdale were asked if they contacted the CVB before or after they had made the decision to visit. As the following table reveals, 67 percent of visitors indicate they contacted the CVB before they made their decision and 33 percent made contact after they had decided – in line with prior years. Of interest in the table is the finding that a very high level of visitors under 35 (56%) made contact after having made a decision.

**TABLE 3: TIMING OF SCVB CONTACT**

(AMONG THOSE WHO HAVE VISITED SINCE MAKING AN INQUIRY)

“Did you contact the Scottsdale Convention and Visitors Bureau before or after you had made your decision to visit Scottsdale?”

	<u>Before</u>	<u>After</u>
<u>TOTAL</u> - 2010	67%	33%
- 2009	64	36
- 2008	66	34
- 2007	64	36

DETAIL: 2010

CONTACT MODE

Other	56%	44%
Web	69	31

GENDER

Male	74	26
Female	63	37

AGE

Under 35	44	56
35 to 54	65	35
55 or over	71	29

INCOME

Under \$70,000	69	31
\$70,000 to \$99,999	71	29
\$100,000 or over	66	34

REGION

West	83	17
Midwest	58	42
Northeast	67	33
South	65	35

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Fifty-five percent of past visitors indicate they will visit Scottsdale again in the next year (in line with prior years) with older visitors and those from the West revealing the greatest propensity to visit again.

**TABLE 4: REVISITS TO SCOTTSDALE**

(AMONG THOSE WHO HAVE VISITED  
SINCE MAKING AN INQUIRY)

"Do you plan on visiting Scottsdale again in the next 12 months?"

|                     | % YES |
|---------------------|-------|
| <u>TOTAL</u> - 2010 | 55%   |
| - 2009              | 63    |
| - 2008              | 58    |
| - 2007              | 56    |
| - 2006              | 50    |

DETAIL: 2010

|                      |     |
|----------------------|-----|
| <u>CONTACT MODE</u>  |     |
| Other                | 41% |
| Web                  | 57  |
| <u>GENDER</u>        |     |
| Male                 | 56  |
| Female               | 54  |
| <u>AGE</u>           |     |
| Under 35             | 28  |
| 35 to 54             | 55  |
| 55 or over           | 57  |
| <u>INCOME</u>        |     |
| Under \$70,000       | 57  |
| \$70,000 to \$99,999 | 58  |
| \$100,000 or over    | 54  |
| <u>REGION</u>        |     |
| West                 | 71  |
| Midwest              | 52  |
| Northeast            | 43  |
| South                | 52  |

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The study also reveals that 92 percent of all inquirers had visited Scottsdale at least once during the past three years (up from 84% in 2009 and 66% in 2008) with the average visitor having made 2.6 trips. Further, 88 percent of inquirers who visited during the study cycle have visited more than one time over the past three years.

**TABLE 5: SCOTTSDALE TRIPS  
PAST THREE YEARS**

“How many trips, if any, have you made to Scottsdale in the past three years?”

	TOTAL – ALL INQUIRIES				VISITATIONS – 2010		
	2010	2009	2008	2007	Have Visited	Will Visit	No Plan to Visit
One	25%	29%	31%	29%	9%	46%	54%
Two	35	29	14	24	48	16	10
Three	15	12	10	12	20	12	4
Four or more	17	14	11	18	20	15	5
None	<u>8</u>	<u>16</u>	<u>34</u>	<u>17</u>	<u>3</u>	<u>11</u>	<u>27</u>
	100%	100%	100%	100%	100%	100%	100%
MEAN (among those visiting)	2.6	2.5	2.7	2.7	3.0	2.1	1.5

## **INQUIRER DEMOGRAPHICS**

The socio-demographic characteristics of Scottsdale inquirers are detailed below.

### GENDER

Females account for 57 percent of inquirers – unchanged from 56 percent last year.

### AGE

The typical inquirer is in his/her 50s (56.0 median age), with 63 percent of all inquirers being 45 to 64 years old. The median age of inquirers is down slightly from 57.3 last year.

### INCOME

Scottsdale inquirers continue to be an affluent group with a median household income of \$97,600, a figure which is up from \$86,100 in 2009 and \$92,100 in 2008. Individuals who have visited the city continue to reveal the highest median incomes (\$103,000).

### REGION

Thirty-five percent of inquirers come from the Midwest, 24 percent from the West, 21 percent from the South and 20 percent from the Northeast. These figures represent little change from last year.

### CONTACT MODE

Table 5 also reveals that 81 percent of all inquirers contacted the CVB via the website, which is up from 66 percent last year and 54 percent in 2008.

**TABLE 6: INQUIRER DEMOGRAPHICS**

	<u>TOTAL – ALL INQUIRERS</u>					<u>VISITATION – 2010</u>		
	2010	2009	2008	2007	2006	Have Visited	Will Visit	No Plan To Visit
<u>CONTACT MODE</u>								
Other	19%	34%	46%	45%	45%	14%	19%	38%
Web	<u>81</u>	<u>66</u>	<u>54</u>	<u>55</u>	<u>55</u>	<u>86</u>	<u>81</u>	<u>62</u>
	100%	100%	100%	100%	100%	100%	100%	100%
<u>GENDER</u>								
Male	43%	44%	35%	38%	35%	43%	43%	42%
Female	<u>57</u>	<u>56</u>	<u>65</u>	<u>62</u>	<u>65</u>	<u>57</u>	<u>57</u>	<u>58</u>
	100%	100%	100%	100%	100%	100%	100%	100%
<u>AGE</u>								
Under 25	1%	1%	1%	1%	1%	*%	0%	2%
25 to 34	4	3	6	6	8	4	4	1
35 to 44	13	12	19	17	17	14	9	14
45 to 54	29	26	28	26	34	29	30	31
55 to 64	34	35	29	34	27	37	29	34
65 or over	<u>19</u>	<u>23</u>	<u>17</u>	<u>16</u>	<u>13</u>	<u>16</u>	<u>28</u>	<u>18</u>
	100%	100%	100%	100%	100%	100%	100%	100%
<u>MEDIAN AGE</u>								
	56.0	57.3	53.6	55.0	52.2	55.7	57.5	55.7
<u>INCOME</u>								
Under \$40,000	6%	13%	8%	7%		4%	7%	15%
\$40,000 to \$54,999	11	10	12	10		9	15	14
\$55,000 to \$69,999	12	13	12	10		11	15	8
\$70,000 to \$84,999	10	14	12	11		9	13	5
\$85,000 to \$99,999	14	12	12	13	NA	15	12	12
\$100,000 to \$149,999	26	24	24	27		28	22	25
\$150,000 to \$199,999	12	8	12	10		11	11	19
\$200,000 or over	<u>9</u>	<u>6</u>	<u>8</u>	<u>12</u>		<u>13</u>	<u>5</u>	<u>2</u>
	100%	100%	100%	100%		100%	100%	100%
<u>MEDIAN INCOME (000)</u>								
	\$97.6	\$86.1	\$92.1	\$98.0	\$82.4	\$103.0	\$86.1	\$97.2
<u>REGION</u>								
Midwest	35%	32%	25%	33%	31%	35%	41%	25%
West	24	29	29	18	23	25	24	22
South	21	20	21	23	20	20	15	31
Northeast	<u>20</u>	<u>19</u>	<u>25</u>	<u>26</u>	<u>26</u>	<u>20</u>	<u>20</u>	<u>22</u>
	100%	100%	100%	100%	100%	100%	100%	100%

Note: Income categories changed in 2007

\*Indicates % less than .5

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**TRIP CHARACTERISTICS**

The trip characteristics of inquirers who visited Scottsdale since their contact with the CVB or plan to visit in the next 12 months are described on the next several pages.

LENGTH OF VISIT

The typical visitor to Scottsdale spent 5.8 nights, with 60 percent staying five nights or more. Day-trippers comprise seven percent of visitors. These readings closely mirror the patterns recorded over the past few years.

TABLE 7: LENGTH OF VISIT

(AMONG VISITORS)

“How many nights, in total, did you spend in Scottsdale on your trip?”

|            | 2010      | 2009      | 2008      | 2007      | 2006      |
|------------|-----------|-----------|-----------|-----------|-----------|
| Day trip   | 7%        | 8%        | 5%        | 6%        | 7%        |
| 1 to 2     | 9         | 13        | 13        | 9         | 7         |
| 3 to 4     | 24        | 23        | 25        | 28        | 28        |
| 5 to 7     | 40        | 44        | 43        | 35        | 43        |
| 8 or over  | <u>20</u> | <u>12</u> | <u>14</u> | <u>22</u> | <u>15</u> |
|            | 100%      | 100%      | 100%      | 100%      | 100%      |
| <br>MEDIAN | <br>5.8   | <br>5.5   | <br>5.4   | <br>5.4   | <br>5.3   |

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TIMING OF VISIT

Thirty-two percent of inquirers who visited Scottsdale did so during the January to March 2010 period, while 25 percent visited during the April to June 2010 period. This represents a combined January to June figure of 57 percent. Forty-four percent of inquirers who plan to visit Scottsdale plan to do so by the end of 2010.

TABLE 8: DATE OF SCOTTSDALE VISITATION

“During which month and year (did you/will you) visit Scottsdale?”

(AMONG THOSE WHO HAVE VISITED)

MONTH/YEAR OF INQUIRY

<u>MONTH/YEAR OF VISIT</u>	<u>TOTAL</u>	<u>Apr - June '09</u>	<u>July - Sept '09</u>	<u>Oct - Dec '09</u>	<u>Jan - Mar '10</u>
Apr - Jun '09	3%	14%	0%	0%	0%
Jul - Sept '09	13	31	23	0	0
Oct - Dec '09	20	22	34	21	0
Jan - Mar '10	32	14	22	43	48
Apr - Jun '10	25	16	14	23	48
Jul '10	<u>7</u>	<u>3</u>	<u>7</u>	<u>13</u>	<u>4</u>
	100%	100%	100%	100%	100%

(AMONG THOSE WHO PLAN TO VISIT)

MONTH/YEAR OF INQUIRY

<u>MONTH/YEAR OF PLANNED VISIT</u>	<u>TOTAL</u>	<u>Apr - June '09</u>	<u>July - Sept '09</u>	<u>Oct - Dec '09</u>	<u>Jan - Mar '10</u>
Jul - Sep '10	18%	21%	32%	14%	11%
Oct - Dec '10	26	11	24	35	29
Jan - Mar '11	31	43	8	30	38
Apr - Jun '11	11	2	16	10	16
Jul - Sep '11	5	5	10	7	0
Oct - Dec '11	7	17	10	2	3
Not sure	<u>2</u>	<u>1</u>	<u>0</u>	<u>2</u>	<u>3</u>
	100%	100%	100%	100%	100%

-----

TRAVEL PARTY CONFIGURATION

The typical travel party size among inquirers who have visited the city is 2.7 people, with over one-half of all parties (56%) containing two individuals. These patterns reveal a party size which is very similar to the patterns found in each of the previous studies. The data also reveals that 36 percent of travel parties contained individuals between 35 and 49, while 58 percent contained individuals between 50 and 64. Also note that 20 percent of parties contain children under 18.

TABLE 9: TRAVEL PARTY CONFIGURATION

(AMONG VISITORS)

"Including yourself how many people in your traveling party were. . ."

<u>PARTY SIZE</u>	<u>2010</u>	<u>2009</u>	<u>2008</u>	<u>2007</u>	<u>2006</u>
1	11%	8%	14%	14%	13%
2	56	53	49	52	54
3 to 4	21	25	26	24	19
5 or more	<u>12</u>	<u>14</u>	<u>11</u>	<u>10</u>	<u>14</u>
	100%	100%	100%	100%	100%
 MEDIAN	 2.7	 2.8	 2.7	 2.7	 2.8
 <u>% OF PARTIES CONTAINING PERSONS OF FOLLOWING AGES</u>					
5 or younger	7%	7%	8%	4%	7%
6 to 17	13	13	14	10	18
18 to 34	15	14	20	16	21
35 to 49	36	39	41	46	44
50 to 64	58	50	46	47	48
65 or over	22	24	19	17	16

ACCOMMODATIONS

Six out of ten Scottsdale visitors (59%) continue to stay at either a luxury resort (29%), a full-service hotel (21%) or a limited-service hotel or motel (9%). This overall hotel reading is unchanged from 2009 but down from 68 percent in 2007 and 65 percent in 2008.

TABLE 10: ACCOMMODATIONS

(AMONG VISITORS)

"During your visit to Scottsdale, did you stay in a..."

	<u>2010</u>	<u>2009</u>	<u>2008</u>	<u>2007</u>	<u>2006</u>
Luxury resort	29%	26%	34%	36%	33%
Full-service hotel	21	23	21	20	24
Timeshare	20	16	17	13	14
Rental home, apartment, condo	9	14	9	9	8
Private home as a guest	9	9	9	10	10
Limited-service hotel or motel	9	8	10	12	11
Second Home	2	2	*	0	0
RV Park/Campground	<u>1</u>	<u>2</u>	<u>0</u>	<u>*</u>	<u>*</u>
	100%	100%	100%	100%	100%

\*Indicates % less than .5

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## TRIP SPENDING PATTERNS

The typical overnight Scottsdale visitor party spent \$430 per day while in Scottsdale, which is a recovery from last year's figure of \$391. Typical per party spending by those who contacted the CVB other than via the Internet was \$458 per day compared to \$422 by those who contacted the CVB through the Internet. Also notable is that 44 percent of all overnight visitors spent \$500 or more per party per day, which is up from 38 percent from last year.

### TABLE 11: TRIP SPENDING PATTERNS

(AMONG OVERNIGHT VISITORS)

"Now I'd like to get some idea of your spending patterns while you were in Scottsdale. Thinking about a typical day during your visit, on average, how much did you and your travel party spend each day on the following items? When responding, please include the combined spending for all members of your travel party."

|                |           |
|----------------|-----------|
| Under \$100    | 17%       |
| \$100 to \$199 | 8         |
| \$200 to \$299 | 14        |
| \$300 to \$399 | 8         |
| \$400 to \$499 | 9         |
| \$500 to \$749 | 17        |
| \$750 or over  | <u>27</u> |
|                | 100%      |

#### MEDIAN DAILY SPENDING PER PARTY/PER DAY

|        |       |
|--------|-------|
| - 2010 | \$430 |
| - 2009 | 391   |
| - 2008 | 455   |
| - 2007 | 417   |
| - 2006 | 346   |

#### AMONG VISITORS WHO CONTACTED THE CVB

|                               |       |
|-------------------------------|-------|
| - Via BRC, call center or RSL | \$458 |
| - Via the CVB website         | 422   |

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## TRAVEL TO OTHER DESTINATIONS

Thirty-six percent of all inquirers have visited Florida in the past 12 months, while 18 percent have visited Tucson, 18 percent Mexico and 17 percent San Diego. As in the past, travelers' visitation patterns are tied closely to the region in which they reside.

**TABLE 12: TRAVEL TO SPECIFIC  
DESTINATIONS – PAST 12 MONTHS**

(AMONG ALL INQUIRERS)

"Next, have you made pleasure or vacation trips to any of the following travel destinations in the past 12 months?"

	TOTAL					REGION – 2010			
	2010	2009	2008	2007	2006	West	Mid-west	South	North-east
Florida	36%	34%	36%	35%	38%	18%	35%	48%	57%
Tucson	18	18	16	21	13	23	18	14	25
Mexico	18	12	NA	NA	NA	22	17	11	21
San Diego	17	20	20	18	21	32	9	17	12
Taken a cruise	15	14	NA	NA	NA	19	7	14	24
Texas	15	NA	NA	NA	NA	11	15	31	7
Colorado	12	20	NA	NA	NA	19	14	4	10
Palm Springs	11	12	14	12	11	28	5	4	6

NA = Not Asked

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## ACTIVITIES PARTICIPATED IN

Overnight Scottsdale visitors were asked to indicate if they participated in each of 14 specific activities during their visit. As has been the case in prior years, dining (96%) and shopping (90%) are the most frequently participated in activities, followed by day trips (71%), art galleries/museums/performing arts (50%) and western culture/attractions (50%). These readings are relatively consistent with last year.

TABLE 13: ACTIVITIES PARTICIPATED IN

(AMONG OVERNIGHT VISITORS)

"During your most recent visit to Scottsdale, did you participate in any of the following activities?"

|                                               | 2010 | 2009 | 2008 | 2007 | 2006 |
|-----------------------------------------------|------|------|------|------|------|
| Dining                                        | 96%  | 97%  | 96%  | 95%  | 97%  |
| Shopping                                      | 90   | 90   | 89   | 89   | 91   |
| Day trips to other locations in Arizona       | 71   | 77   | 67   | 64   | 68   |
| Art galleries and museums or performing arts  | 50   | 55   | 48   | 50   | 53   |
| Western culture and attractions               | 50   | 51   | 41   | 43   | 50   |
| Native American arts and culture              | 49   | 53   | 39   | 44   | 48   |
| Outdoor desert activities                     | 41   | 44   | 38   | 53   | 65   |
| Special events                                | 36   | 37   | 32   | 31   | 33   |
| Nightlife                                     | 35   | 34   | 42   | 36   | 45   |
| Overnight trips to other locations in Arizona | 29   | 30   | 29   | 25   | NA   |
| Golf                                          | 29   | 30   | 22   | 30   | 25   |
| Spa/rejuvenation                              | 27   | 30   | 34   | 25   | 27   |
| Sporting events                               | 24   | 31   | 28   | 24   | 21   |
| Children's activities                         | 10   | NA   | 10   | 11   | 13   |

NA = Not Asked

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On the following table it may be seen that participation differs greatly by visitor demographics.

**TABLE 14: ACTIVITIES PARTICIPATED IN – DETAIL**

	TOTAL	GENDER		AGE			INCOME		
		Male	Female	Under 35	35 to 54	55 or Over	Under \$70K	\$70K to \$99.9K	\$100K or Over
Shopping	90%	91%	89%	92%	92%	89%	90%	93%	91%
Day trips	71	68	73	67	69	73	74	78	65
Art galleries and museums	50	43	55	38	48	53	38	45	58
Western culture and attractions	50	48	50	44	52	48	61	48	42
Native American arts/culture	49	49	49	21	50	52	56	48	47
Outdoor desert activities	41	43	40	37	51	35	45	38	43
Special events	36	32	39	35	32	39	35	51	30
Nightlife	35	37	34	53	37	34	35	37	36
Overnight trips	29	28	30	21	24	34	31	32	27
Golf	29	35	25	27	34	26	18	24	40
Spa/rejuvenation	27	23	30	27	32	23	25	25	33
Sporting events	24	28	20	12	28	21	14	26	25
Children's activities	10	10	9	20	15	5	13	9	10

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The most popular locations for day trips and overnight trips for Scottsdale visitors continue to be Sedona and the Grand Canyon.

TABLE 15: DESTINATION OF DAY/OVERNIGHT TRIPS

(AMONG VISITORS MAKING EACH TYPE OF TRIP)

"Where did you take day trips/overnight trips to?"

|                                                                         | Day<br>Trips | Overnight<br>Trips |
|-------------------------------------------------------------------------|--------------|--------------------|
| Sedona                                                                  | 68%          | 56%                |
| Grand Canyon                                                            | 30           | 42                 |
| Tucson                                                                  | 21           | 17                 |
| Other metro Phoenix locations                                           | 20           | 6                  |
| Jerome/Clarkdale/Camp Verde                                             | 5            | 2                  |
| Southeast Arizona (Tombstone,<br>Bisbee, Sierra Vista)                  | 4            | 7                  |
| Northeast Arizona (White Mountains,<br>Payson, Globe, Petrified Forest) | 4            | 4                  |
| Flagstaff/Williams                                                      | 3            | 11                 |
| Prescott                                                                | 3            | 7                  |
| Yuma                                                                    | 1            | 2                  |

Totals exceed 100% due to multiple trips

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**EVALUATION OF SCOTTSDALE AS A VACATION DESTINATION**

Over nine out of ten inquirers who have visited Scottsdale (93%) continue to rate it as either an excellent (58%) or good (35%) vacation destination compared to other areas they have visited. In comparison, six percent rate the city as just okay and one percent rate it as poor. The excellent rating of 58 percent is unchanged from last year.

The main reasons that visitors offer only a just okay or poor rating are: hot weather (4 responses) hard to get around/no transit (4); limited tourist attractions (3); limited kids activities (3); dislike hotel (2); poor casino (2); too centered on golf (2); everything closes too early (2); too commercial (2); overpriced (1); and poor restaurants (1).

**TABLE 16: SCOTTSDALE COMPARED TO  
OTHER AREAS VISITED**

(AMONG VISITORS)

“Next, overall how would you rate Scottsdale as a vacation destination compared to other areas you visit – excellent, good, just ok or poor?”

	Excel- lent	Good	Just Ok	Poor
<u>TOTAL</u> - 2010	58%	35%	6%	1%
- 2009	58	35	7	*
- 2008	56	42	2	0
- 2007	61	36	3	*
- 2006	70	28	2	0

DETAIL: 2010

<u>GENDER</u>				
Male	58%	33%	8%	1%
Female	58	36	4	2
<u>AGE</u>				
Under 35	47	42	11	0
35 to 54	61	34	4	1
55 or over	57	35	6	2
<u>INCOME</u>				
Under \$70,000	64	29	7	0
\$70,000 to \$99,999	56	41	3	0
\$100,000 or over	61	29	7	3

\*Indicates % less than .5.

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## RECEIPT OF SCOTTSDALE CVB MATERIALS

Two out of three Scottsdale visitors (67%) indicate they received printed materials from the Scottsdale CVB. This reading is down from a high of 80 percent in 2005.

TABLE 17: RECEIPT OF PRINTED MATERIAL

“When planning your trip to Scottsdale, did you receive printed materials from the Scottsdale Convention and Visitors Bureau?”

|                      | <u>% YES</u> |             |             |             |             |
|----------------------|--------------|-------------|-------------|-------------|-------------|
|                      | <u>2010</u>  | <u>2009</u> | <u>2008</u> | <u>2007</u> | <u>2006</u> |
| <u>TOTAL</u>         | 67%          | 72%         | 74%         | 77%         | 78%         |
| <u>GENDER</u>        |              |             |             |             |             |
| Male                 | 63           | 70          | 75          | 76          | 80          |
| Female               | 70           | 73          | 73          | 79          | 77          |
| <u>AGE</u>           |              |             |             |             |             |
| Under 35             | 82           | 59          | 64          | 78          | 81          |
| 35 to 54             | 71           | 75          | 77          | 79          | 82          |
| 55 or over           | 63           | 70          | 72          | 77          | 72          |
| <u>INCOME</u>        |              |             |             |             |             |
| Under \$70,000       | 65           | 64          | 61          | 82          | 76          |
| \$70,000 to \$99,999 | 65           | 79          | 79          | 79          | 81          |
| \$100,000 or over    | 71           | 74          | 79          | 75          | 81          |

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Among the 67 percent of visitors who indicate they received printed materials from the CVB, 94 percent report the materials were received in a timely fashion. This reading is unchanged from prior years.

TABLE 18: TIMELY RECEIPT OF CVB PRINTED MATERIAL

(AMONG THOSE RECEIVING MATERIALS)

“Did you receive the printed material you requested from the Scottsdale Convention and Visitors Bureau in a timely fashion?”

|      | <u>% YES</u> |
|------|--------------|
| 2010 | 94%          |
| 2009 | 95           |
| 2008 | 92           |
| 2007 | 93           |
| 2006 | 93           |

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The materials the CVB distributes continue to be viewed positively by visitors, with 59 percent indicating they were very useful and 39 percent somewhat useful. Only two percent of visitors indicate the materials were not useful. The very useful reading is down from 64 percent in 2009.

**TABLE 19: USEFULNESS OF CVB MATERIALS**

(AMONG THOSE RECEIVING MATERIALS)

“Did you find the material you received from the Scottsdale Convention and Visitors Bureau very useful, somewhat useful or not very useful?”

	Very Useful	Somewhat Useful	Not Very Useful
<u>TOTAL</u> - 2010	59%	39%	2%
- 2009	64	34	2
- 2008	64	35	1
- 2007	65	34	1
- 2006	64	33	3

DETAIL: 2010

<u>GENDER</u>			
Male	58%	40%	2%
Female	61	37	2
<u>AGE</u>			
Under 35*	42	49	9
35 to 54	62	35	3
55 or over	58	41	1
<u>INCOME</u>			
Under \$70,000	64	34	2
\$70,000 to \$99,999	60	40	0
\$100,000 or over	62	36	2

\* Small sample

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Better than nine out of ten visitors (92%) are satisfied with the physical size of the guide they received.

TABLE 20: SIZE FORMAT OF GUIDE

“Was the size format of the guide you received too small, about right or too large?”

|              |          |
|--------------|----------|
| Too small    | 2%       |
| About right  | 92       |
| Too large    | 2        |
| Don't recall | <u>4</u> |
|              | 100%     |

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## WEBSITE VISITATION

Inquirers with Internet access were next asked whether they had visited the Scottsdale CVB's website within the past six months. As Table 21 reveals, 36 percent have visited the Scottsdale CVB's site – down from 47 percent in 2008 and 42 percent in 2009.

TABLE 21: WEBSITE VISITATION

(AMONG THOSE WITH INTERNET ACCESS)

“Have you visited the Scottsdale Convention and Visitors Bureau's website within the past six months?”

	<u>2010</u>	<u>2009</u>	<u>2008</u>	<u>2007</u>	<u>2006</u>
<u>TOTAL</u>	36%	42%	47%	52%	47%
<u>GENDER</u>					
Male	37	42	45	57	49
Female	36	41	48	49	46
<u>AGE</u>					
Under 35*	42	29	46	48	44
35 to 54	39	48	51	56	54
55 or over	34	38	42	49	38
<u>INCOME</u>					
Under \$70,000	37	43	43	47	32
\$70,000 to \$99,999	37	45	40	61	43
\$100,000 or over	38	41	53	54	51

\* Major shift may be due to small sample size.

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The next question asked inquirers with Internet access about their interest in receiving information in selected electronic formats. This line of inquiry reveals that emails (34% very interested) generate the highest interest followed by PDF documents (24%) and videos (20%). The email reading is down eight points from last year after increasing seven points between 2008 and 2009.

**TABLE 22: INTEREST IN RECEIVING INFORMATION  
IN SELECTED ELECTRONIC FORMATS**

(AMONG THOSE WITH INTERNET ACCESS)

“Would you be very interested, somewhat interested or not very interested in receiving information from a destination you were considering visiting in any of the following electronic formats?”

|                            | Very | Some-<br>what | Not<br>Very | Not<br>Familiar<br>With | VERY<br>IMPORTANT |      |
|----------------------------|------|---------------|-------------|-------------------------|-------------------|------|
|                            |      |               |             |                         | 2009              | 2008 |
| Emails                     | 34%  | 35%           | 30%         | 2%                      | 42%               | 35%  |
| Downloadable PDF documents | 24   | 32            | 39          | 5                       | 24                | 22   |
| Videos                     | 20   | 24            | 53          | 3                       | 20                | 18   |
| Mobile applications        | 7    | 7             | 71          | 15                      | NA                | NA   |
| Text messages              | 3    | 9             | 80          | 8                       | 4                 | 4    |

% VERY INTERESTED

|                      | Emails | PDF | Videos | Mobile<br>APS | Text |
|----------------------|--------|-----|--------|---------------|------|
| <u>TOTAL</u>         | 34%    | 24% | 20%    | 7%            | 3%   |
| <u>GENDER</u>        |        |     |        |               |      |
| Male                 | 33     | 27  | 25     | 9             | 4    |
| Female               | 35     | 21  | 16     | 6             | 3    |
| <u>AGE</u>           |        |     |        |               |      |
| Under 35*            | 6      | 36  | 16     | 9             | 2    |
| 35 to 54             | 41     | 26  | 23     | 9             | 3    |
| 55 or over           | 31     | 20  | 18     | 6             | 3    |
| <u>INCOME</u>        |        |     |        |               |      |
| Under 470,000        | 30     | 15  | 19     | 5             | 3    |
| \$70,000 to \$99,999 | 31     | 22  | 24     | 6             | 0    |
| \$100,000 or over    | 39     | 30  | 20     | 11            | 4    |

\* Small sample

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## CHANGES IN PLEASURE TRAVEL NEXT 12 MONTHS

Inquirers were asked how they thought their leisure travel patterns may change in the next 12 months in terms of number of trips, length of trips and spending level. This data is summarized in the next three tables.

TRIP FREQUENCY: Twenty-six percent of inquirers indicate they will take more trips in the coming 12 months, while 13 percent say they will take fewer trips for a +13 net more reading – up from +8 in 2009. Also note that the no change reading has increased from 37 percent to 49 percent. Males, older and wealthier individuals continue to reveal the greatest likelihood of taking more trips.

TRIP LENGTH: Twenty-two percent of inquirers indicate they will take longer trips, while 13 percent say they will take shorter trips for a +9 net longer reading – up from +2 in 2009. Again, males and older individuals reveal the greatest likelihood of taking longer trips.

TRIP SPENDING: Eighteen percent of inquirers indicate they will spend more on trips, while 16 percent say they will spend less for a +2 net spending reading – up from -9 in 2009. Males and older individuals reveal the greatest likelihood of spending more.

**TABLE 23: CHANGES IN TRIP FREQUENCY**

“In the next 12 months do you plan on taking more or fewer pleasure trips than you did in the previous 12 months?”

	More	Fewer	No Change	Not Sure	NET MORE/ FEWER
<u>TOTAL</u> – 2010	26%	13%	49%	12%	+13
– 2009	30	22	37	11	+ 8

DETAIL: 2010

<u>GENDER</u>	More	Fewer	No Change	Not Sure	NET MORE/ FEWER
Male	29%	11%	50%	10%	+18
Female	25	14	49	12	+11
<u>AGE</u>					
Under 35*	8	21	50	21	-13
35 to 54	28	13	47	12	+15
55 or over	27	11	52	10	+16
<u>INCOME</u>					
Under \$70,000	27	18	41	14	+ 9
\$70,000 to \$99,999	33	8	52	7	+25
\$100,000 or over	27	13	51	9	+14

\* Small sample

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TABLE 24: CHANGES IN TRIP LENGTH

“Do you plan taking longer or shorter pleasure trips?”

|                     | <u>Longer</u> | <u>Shorter</u> | <u>No<br/>Change</u> | <u>Not<br/>Sure</u> | <u>NET<br/>LONGER/<br/>SHORTER</u> |
|---------------------|---------------|----------------|----------------------|---------------------|------------------------------------|
| <u>TOTAL</u> – 2010 | 22%           | 13%            | 51%                  | 14%                 | + 9                                |
| – 2009              | 23            | 21             | 41                   | 15                  | + 2                                |

DETAIL: 2010

| <u>GENDER</u>        |     |     |     |     |     |
|----------------------|-----|-----|-----|-----|-----|
| Male                 | 25% | 11% | 52% | 12% | +14 |
| Female               | 21  | 14  | 50  | 15  | + 7 |
| <u>AGE</u>           |     |     |     |     |     |
| Under 35*            | 21  | 19  | 40  | 20  | + 2 |
| 35 to 54             | 20  | 13  | 52  | 15  | + 7 |
| 55 or over           | 25  | 13  | 51  | 11  | +12 |
| <u>INCOME</u>        |     |     |     |     |     |
| Under \$70,000       | 27  | 19  | 37  | 17  | + 8 |
| \$70,000 to \$99,999 | 26  | 13  | 54  | 7   | +13 |
| \$100,000 or over    | 20  | 11  | 59  | 10  | + 9 |

\* Small sample

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TABLE 25: CHANGES IN TRIP SPENDING

“And do you plan on spending more or less during pleasure travel?”

	More	Less	No Change	Not Sure	NET MORE/ LESS
<u>TOTAL</u> – 2010	18%	16%	52%	14%	+ 2
– 2009	16	25	39	20	- 9

DETAIL: 2010

	More	Less	No Change	Not Sure	NET MORE/ LESS
<u>GENDER</u>					
Male	21%	13%	55%	11%	+ 8
Female	16	18	51	15	- 2
<u>AGE</u>					
Under 35*	9	34	55	2	- 25
35 to 54	16	17	51	16	- 1
55 or over	21	14	53	12	+ 7
<u>INCOME</u>					
Under \$70,000	15	19	48	18	- 4
\$70,000 to \$99,999	20	16	57	7	+ 4
\$100,000 or over	20	13	55	12	+ 7

\* Small sample

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# APPENDIX

## SURVEY QUESTIONNAIRE

Hello, may I speak to (SPECIFIC PERSON LISTED) please?

(WHEN PERSON ON LINE, CONTINUE — IF NOT AVAILABLE, ARRANGE CALLBACK)

Hello (PERSON'S NAME) my name is \_\_\_\_\_ and I'm calling on behalf of the Scottsdale, Arizona Convention and Visitor's Bureau. Sometime back you contacted the Scottsdale Convention and Visitor's Bureau for information on our area or filled out a form requesting information on our area and I'd like to talk with you for just a few moments.

1. To begin, have you visited Scottsdale since requesting information? (GO TO Q2) Yes...1  
(GO TO Q1a) No...2
- 1a. Do you plan on visiting Scottsdale during the next 12 months? (GO TO Q2) Yes...1  
(GO TO Q1b) No...2
- 1b. Why don't you plan on visiting Scottsdale in the next 12 months?

(GO TO Q13)

2. During which month and year (did you/will you) visit Scottsdale? Month / / /  
Year 19/ / /
3. How many nights, in total, (did you/will you) spend in Scottsdale on your trip? NIGHTS: / / /  
(CODE 999 IF DAY TRIP)

IF Q3 = 999 GO TO Q5; OTHERWISE GO TO Q4

4. During your visit to Scottsdale (did you/will you) stay in a... (READ EACH)
- A luxury resort...1  
A full-service hotel...2  
A limited-service hotel or motel...3  
A timeshare...4  
Private home as a guest...5  
Or a rental home, apt or condo...6  
(DO NOT READ) \_\_\_\_\_ Other (SPECIFY)  
Not sure...9
5. Including yourself, how many people in your traveling party (were/will be)... (READ EACH)
- 5 or younger: \_\_\_\_\_  
6 to 17: \_\_\_\_\_  
18 to 34: \_\_\_\_\_  
35 to 49: \_\_\_\_\_  
50 to 64: \_\_\_\_\_  
65 or over: \_\_\_\_\_  
(DO NOT READ) TOTAL:

| 6. During your (most recent/upcoming) visit to Scottsdale, (did/will) you participate in any of the following activities? (ROTATE ALL EXCEPT N&O) | <u>Yes</u> | <u>No</u> | <u>Not Sure</u> |
|---------------------------------------------------------------------------------------------------------------------------------------------------|------------|-----------|-----------------|
| A.. Golf .....                                                                                                                                    | 1          | 2         | 3               |
| - Spa/rejuvenation .....                                                                                                                          | 1          | 2         | 3               |
| - Art galleries and museums or performing arts .....                                                                                              | 1          | 2         | 3               |
| - Native American arts and culture .....                                                                                                          | 1          | 2         | 3               |
| - Western culture and attractions .....                                                                                                           | 1          | 2         | 3               |
| - Special events .....                                                                                                                            | 1          | 2         | 3               |
| - Sporting events .....                                                                                                                           | 1          | 2         | 3               |
| - Outdoor desert activities such as horseback riding and hiking .....                                                                             | 1          | 2         | 3               |
| - Shopping .....                                                                                                                                  | 1          | 2         | 3               |
| - Dining .....                                                                                                                                    | 1          | 2         | 3               |
| - Nightlife .....                                                                                                                                 | 1          | 2         | 3               |
| <hr/>                                                                                                                                             |            |           |                 |
| - Day trips to other locations in Arizona .....                                                                                                   | 1          | 2         | 3               |
| - Overnight trips to other locations in Arizona .....                                                                                             | 1          | 2         | 3               |
| - Children's activities .....                                                                                                                     | 1          | 2         | 3               |

**IF YES TO DAY TRIPS (Q6L=1) GO TO Q6a;  
OTHERWISE GO TO NEXT INSTRUCTION**

- 6a. Where (did/will) you take day trips to? (**DO NOT READ LIST; MARK ALL MENTIONED**)
- Sedona...01  
Grand Canyon...02  
Tucson...03  
Other (**SPECIFY**) \_\_\_\_\_  
Not sure...99

**IF YES TO OVERNIGHT TRIPS (Q6M=1) GO TO Q6b;  
OTHERWISE GO TO NEXT INSTRUCTION**

- 6b. Where (did/will) you take overnight trips to? (**DO NOT READ LIST; MARK ALL MENTIONED**)
- Sedona...01  
Grand Canyon...02  
Tucson...03  
Other (**SPECIFY**) \_\_\_\_\_  
Not sure...99

**IF VISITED SCOTTSDALE (Q1=1) GO TO Q7; OTHERWISE GO TO Q9**

7. Now I'd like to get some idea of your spending patterns while you were in Scottsdale. Thinking about a typical day during your visit, on average, how much did you and your travel party spend each day on the following items? When responding, please include the combined spending for all members of your travel party.

- |                                                                                                                              |           |
|------------------------------------------------------------------------------------------------------------------------------|-----------|
| A. On lodging .....                                                                                                          | / / / / / |
| B. On food and beverage purchases .....                                                                                      | / / / / / |
| C. On entertainment including amusement, attraction and recreation fees .....                                                | / / / / / |
| D. On daily local transportation including gas, taxi, limo, van service and public transportation including car rental ..... | / / / / / |
| E. On arts purchases .....                                                                                                   | / / / / / |
| F. On retail shopping .....                                                                                                  | / / / / / |
| G. For any other things I haven't mentioned ( <b>SPECIFY</b> ) _____                                                         | / / / / / |

8. Did you contact the Scottsdale Convention and Visitors Bureau before or after you had made your decision to visit Scottsdale? Before...1  
After...2  
Don't recall...3
9. When planning your trip to Scottsdale did you receive any printed material from the Scottsdale Convention and Visitor's Bureau? (GO TO Q10) Yes...1  
(GO TO Q13) No...2  
Not sure...3
10. Did you receive the printed material you requested from the Scottsdale Convention and Visitor's Bureau in a timely fashion? Yes...1  
No...2  
Don't recall...3
11. Did you find the material you received from the Scottsdale Convention and Visitor's Bureau very useful, somewhat useful, or not very useful? Very useful...1  
Somewhat Useful...2  
Not very useful...3  
Don't recall...4
12. Was the size format of the guide you received too small, about right or too large? Too small...1  
About right...2  
Too large...3  
Don't recall...4
13. Have you visited the Scottsdale Convention and Visitor's Bureau's web site within the past 6 months? Yes...1  
No...2  
Not sure...3
- 13a. Would you be very interested, somewhat interested or not very interested in receiving information from a destination you were considering visiting in any of the following electronic formats? (ROTATE)
- |                               | Very | Some-<br>what | Not<br>Very | Not<br>Familiar<br>With |
|-------------------------------|------|---------------|-------------|-------------------------|
| A. Mobile applications        | 1    | 2             | 3           | 4                       |
| B. Downloadable PDF documents | 1    | 2             | 3           | 4                       |
| C. Videos                     | 1    | 2             | 3           | 4                       |
| D. Text messages              | 1    | 2             | 3           | 4                       |
| E. Emails                     | 1    | 2             | 3           | 4                       |
14. Next, have you made pleasure or vacation trips to any of the following travel destinations in the past 12 months? (ROTATE ALL EXCEPT H)
- |                                                       | Yes | No |
|-------------------------------------------------------|-----|----|
| A. Mexico                                             | 1   | 2  |
| B. Tucson, Arizona                                    | 1   | 2  |
| C. Texas                                              | 1   | 2  |
| D. San Diego, California                              | 1   | 2  |
| E. Palm Springs, California                           | 1   | 2  |
| F. Florida                                            | 1   | 2  |
| G. Colorado                                           | 1   | 2  |
| H. And have you taken a cruise in the past 12 months? | 1   | 2  |

**IF VISITED SCOTTSDALE (Q1=1) GO TO Q15; OTHERWISE GO TO Q16**

15. Next, overall how would you rate Scottsdale as a vacation destination compared to other areas you visit - excellent, good, just ok or poor? (GO TO Q16) Excellent...1  
Good...2  
(GO TO 15a) Just ok...3  
Poor...4  
(GO TO Q16) Not sure...5

15a. Why do you rate Scottsdale as (just ok/poor)?

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16. How many total trips, if any, have you made to Scottsdale in the past three years? 0...0  
 1...1  
 2...2  
 3...3  
 4...4  
 5-9...5  
 10 or more...6

**IF VISITED SCOTTSDALE (Q1=1), GO TO Q17; OTHERWISE GO TO Q18**

17. Do you plan on visiting Scottsdale again in the next 12 months? Yes...1  
 No...2
18. In the next 12 months do you plan on taking more or fewer pleasure trips than you did in the previous 12 months? More...1  
 Fewer...2  
 No change...3  
 Not sure...4
- 18a. Do you plan taking longer or shorter pleasure trips? Longer...1  
 Shorter...2  
 No change...3  
 Not sure...4
- 18b. And do you plan on spending more or less during pleasure travel? More...1  
 less...2  
 No change...3  
 Not sure...4
19. Now, before I finish, I need to ask you a couple of questions for classification purposes. First, which one of the following categories best describes your age? Under 25...1  
 25 to 34...2  
 35 to 44...3  
 45 to 54...4  
 55 to 64...5  
 65 or over...6  
 (DO NOT READ) Refused...7
20. And finally, which one of the following categories best describes your total family income for last year, I mean before taxes and including everyone in your household? Just stop me when I come to the correct category. (READ EACH) Under \$40,000...1  
 \$40,000 to \$54,999...2  
 \$55,000 to \$69,999...3  
 \$70,000 to \$84,999...4  
 \$85,000 to \$99,999...5  
 \$100,000 to \$149,999...6  
 \$150,000 to \$199,000...7  
 \$200,000 or over...8  
 (DON'T READ) Refused...9

Thank you very much, that completes this interview. If the Scottsdale Convention and Visitor's Bureau can be of any further help to you in the future, please give us a call at 1-800-782-1117.

NAME: \_\_\_\_\_ PHONE #: \_\_\_\_\_

**OBSERVED DATA:**

Male...1  
 Female...2  
 ZIP CODE: \_\_\_\_\_  
 MONTH: \_\_\_\_\_  
 TOUCH POINT: \_\_\_\_\_  
 MEDIA CODE: \_\_\_\_\_  
 NUMBER: \_\_\_\_\_

INTERVIEWER NAME: \_\_\_\_\_